

WAITROSE  
& PARTNERS



BY APPOINTMENT TO  
HER MAJESTY THE QUEEN  
GROCER AND FISH & SEAFOOD SUPPLIERS  
SINCE 1867



BY APPOINTMENT TO  
HER MAJESTY THE PRINCESS OF WALES  
GROCER AND FISH & SEAFOOD SUPPLIERS  
SINCE 1867

# FOOD AND DRINK REPORT 2019–20







WELCOME

# KINDNESS CAN BE UNDERRATED,

but our research this year found

that we've rediscovered our spirit of compassion. People up and down the country are caring and sharing: cooking to help friends, taking homemade treats into work, or baking cakes for a charity event or fête. As well as home cooking, we're home growing, as this trend goes hand in hand with an increase in the number of people growing their own fruit and veg. There's even been an accompanying boom in crafts and hobbies. Underpinning all this is the sense that life's pendulum is swinging away from materialism and towards a desire for people to share memorable experiences with loved ones.

Taken together, these things point to a rise in compassion and simplicity in British lifestyles. It seems that, as the world beyond their front doors becomes increasingly complicated, people are doubling down on the things that really matter. Households are decluttering to focus on the values – and people – that mean the most to them.

At Waitrose & Partners we're helping customers in every way we can. The standard and care with which we source our food fits perfectly with the 'quality not quantity' philosophy. Customers in our stores or shopping online know they can trust us on products and on the environment. Compassion in World Farming has recently voted us the best retailer in Europe for farm-animal welfare for the third time in a row, and we will eliminate all hard-to-recycle black plastic from our own-brand products by the end of this year. And we've had an overwhelming response to our 'Unpacked' trial, where we've removed packaging from 200 products in our Oxford shop, so we're extending elements of that initiative to three more shops.

When it comes to home cooking, we help make things easier for families with our healthy ingredients, short cuts and meal inspirations. And our Partners – our food and service ambassadors – have a wealth of specialist knowledge. With them, Waitrose & Partners provides what people need to create special, homespun moments and memories.

I hope you find plenty to enjoy in our Food & Drink Report 2019-20.



ROB COLLINS

Partner & Managing Director, Waitrose & Partners

## THE FACTS & FIGURES

Waitrose & Partners carried out extensive research into the top food and drink trends of 2019.

We conducted OnePoll consumer research on a wide range of topics with 2,000 people of all ages – not exclusively Waitrose & Partners shoppers. This research was supported by focus groups in which participants were asked in-depth questions about their shopping, cooking and eating habits. Some of the focus-group participants share their views with us in this report.

The research is further supported by insights from our food, drink and retail Partners. It's backed up with sales data from millions of purchases throughout the year.

All figures are compared with the same period the previous year, unless otherwise stated.

### TAHINI

A core element of houmous, tahini is made from hulled sesame seeds that have been toasted and ground. It's now a popular ingredient in its own right, with searches for tahini paste on waitrose.com up more than 700% on last year.

### NOODLES

Easy, delicious and fun, noodles can work as a healthy option or a quick snack. No wonder they're in vogue. Searches for soba noodles on waitrose.com are up 83%, udon noodles searches are up 50% and sales of egg noodles have risen 22%. The ramen course at our King's Cross Cookery School is one of our most popular.

### CELERY JUICE

Almost a social media star in its own right, celery juice is omnipresent in the hands of influencers. Sales of organic celery at Waitrose & Partners are up 30%, while searches on Pinterest have risen 2,457%.

### POSH CRUMPETS

It was only a matter of time before nostalgia brought back this old teatime favourite. Crumpet sales are up 27% and chefs such as Yotam Ottolenghi and Marcus Wareing are inspiring us with toppings like lobster, cockle butter, or Cheddar and Marmite.

### ECO CLEANING PRODUCTS

Kitchens and bathrooms are turning green all over the country. Sales of eco household cleaning products at Waitrose & Partners are up 17%, eco laundry sales have risen 40% and eco dishwashing products are up 26%. Even recycled toilet paper is selling 39% more than last year.

### GRAINS

Shoppers are going with the grain – in particular, sales of amaranth are up 20% while mixed pouches of quinoa, chickpea, bulgur wheat and rice have seen sales rise by 36%.

### LUXURY FROZEN FOOD

Shoppers are filling their freezers with cook-at-home croissants and Kerala cod ready-meals as premium frozen food goes mainstream. Waitrose & Partners' new premium range includes King Prawn, Mussel & Clam Tagliatelle and an Italian Slow-Cooked Pork Belly.

### SKEWERS

From street-food trucks to hipster kebab joints, skewered food is at the sharp end of fashion. The trend is easy to replicate at home, using leftover meat and veg from your fridge. Four out of five of the bestselling barbecue meat lines at Waitrose & Partners are kebabs, while sales of metal skewers are up 9%.

### SEAWEED AND MORE

This year, many of us have been choosing ingredients from the sea. Delicious in their own right, kelp, algae, samphire and nori all add umami flavour to dishes. Searches for 'aonori seaweed' are up 127% on waitrose.com. And 'seaganism' – a vegan diet but including sustainable seafood – has been gaining a following.

### VEGAN READY-MEALS

Sales of these are doing so well that they've overtaken their vegetarian counterpart for the first time. Vegan favourites include mushroom carbonara and paella.

## WHAT LED THE WAY IN 2019

# GOING UP



**TREND ONE**

Britons are moving towards a simpler existence. Our research found that families are refocusing on the fundamentals – cooking uncomplicated meals, growing their own food, taking up a traditional hobby and turning their backs on materialism

Instead of defining happiness by achievements or possessions, we're appreciating simpler pleasures. Six in 10 Brits say that sharing memorable experiences with loved ones is their priority, compared with just 4% who say acquiring 'things' is their main concern. Four in 10 people believe they've become less materialistic over the past decade. Eating together as a family is key to creating memorable experiences, but a fifth of people say they're cooking simpler meals than they used to. We're taking shortcuts such as using pouches of rice or grains, using frozen chopped vegetables or herbs, and batch cooking – more than a third of people in our research say they've made use of each of these.

'We know nearly half of Brits cook weekday evening meals in under 30 minutes and we're seeing a desire to remove the "fog" of multiple decisions,' says Stephanie Chafor, Partner & head of grocery buying at Waitrose & Partners. 'People are looking for fewer ingredients, fewer steps and fewer decisions, especially mid-week.'

To turn this spare time into quality time, almost half of us (and 57% of 18-24 year olds) are using it for hobbies – including growing our own food (30% of respondents). The main reason (given by almost two-thirds of hobbyists) is that these pastimes help with mental wellbeing. A third say they do hobbies to be kind to themselves, while nearly a quarter are fed up with life's hectic pace.

# THE SIMPLE LIFE

'In many areas we're seeing a "Good Life" approach to food and cooking. For example, people growing their own produce. We think it's driven by a number of things: taking comfort in a simple approach to living, saving money, or having an eye on the environment. You can't get much more local than your own back garden or window box.'

ALISON OAKERVEE  
Partner & Food Editor



**38%**  
OF US HAVE BECOME LESS MATERIALISTIC OVER THE PAST DECADE

...WHILE JUST 4% OF US RATE OWNING MORE THINGS AS PERSONALLY IMPORTANT

**61%**

OF US SAY SHARING MEMORABLE EXPERIENCES WITH LOVED ONES IS THE MOST IMPORTANT THING TO US

**TREND TWO**

## MINDFUL SPENDING

Contactless payment has made it all too easy for us to buy without thinking. But people are starting to pay more attention to their purchases and to keep more of an eye on their finances. Half the people in our OnePoll research say they're prioritising what they buy more now than they were five years ago. Just 5% say they were more focused on their budget back then.

Daily outlays soon add up, so families are making small savings across the board. Half are buying fewer lunches out, takeaways and snacks, and 46% are going to the pub less. In total, 36% of us say we are buying fewer non-essentials and considering more carefully whether we need something before buying it.

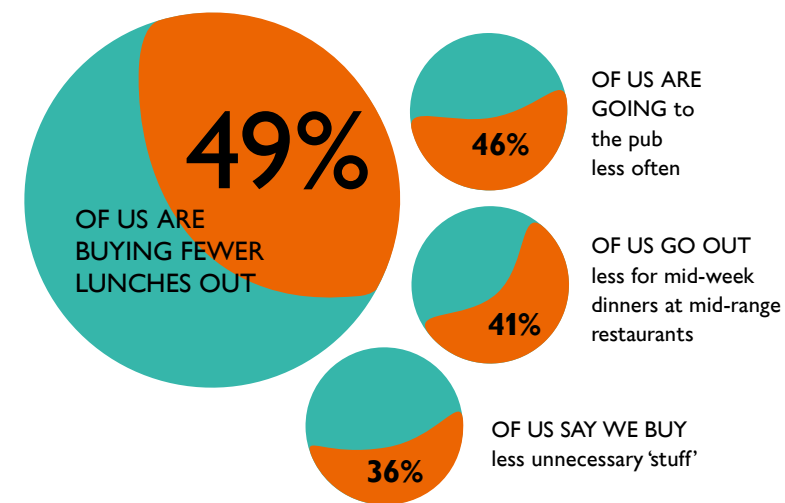
But people are still embracing what the experts call 'controlled discovery'. When we do spend, we want the results to be special – for instance, seeking out unusual treats.

'There's a trend for creating theatre from ordinary things: taking the time to make a proper cup of tea, or to enjoy a really great piece of chocolate cake,' explains Stephanie Chafor, Partner & head of grocery buying.

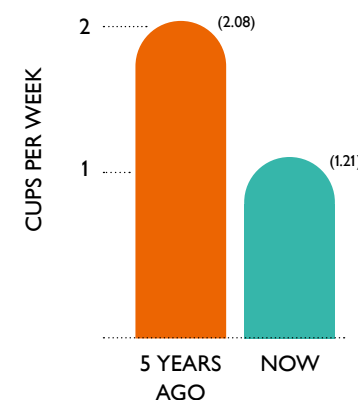
This paring back of spending is illustrated by the reduction in the number of people buying multiple hot drinks from UK coffee shops every week. Nearly half of people are buying fewer hot drinks overall – but more of us are treating ourselves just once a week. We still love to indulge, but we think more carefully about when we do it.

**'We're seeing an interest in "controlled discovery". People are exploring new tastes and adventures, but without making a big commitment.'**

NATALIE MITCHELL  
Partner & Head of Product Innovation



**HOW MANY HOT DRINKS DO YOU BUY PER WEEK?**



**50%** OF US BUY 1 HOT DRINK OR FEWER PER WEEK (5 years ago this figure was 31%).

Only 6% of us now buy more than 4 cups per week, whereas 5 years ago 16% did so.

## TREND THREE

# A PASSION FOR COMPASSION

It's cool to be kind again. Altruism, or small acts of generosity towards others, seems to be increasing, especially among young people

**T**here's a definite move towards kindness – to yourself, others and the planet,' explains Tor Harris, Waitrose & Partners head of corporate social responsibility. 'As a society, we're becoming increasingly aware of how these three things are linked and are striving for compassion. People are more conscious about avoiding choices that would negatively affect something or someone else.'

The rise of social media has helped to get people involved, persuading them to offer support or assistance. According to Tor Harris, platforms such as Twitter and Facebook encourage people to do good deeds, help crowdfund or publicise a cause.

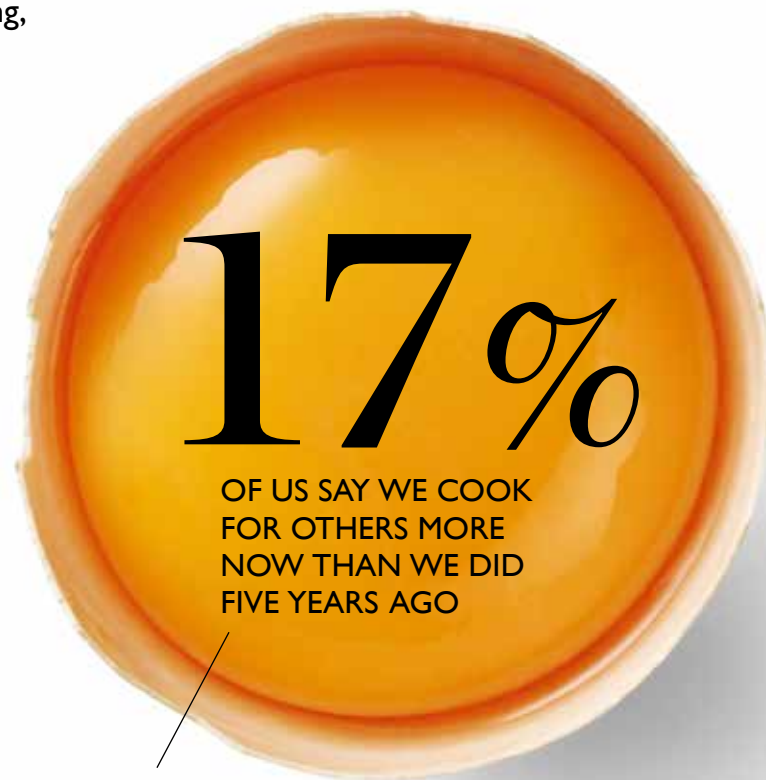
Our research revealed a marked rise in the number of people cooking for loved ones, friends or colleagues. It seems Brits have discovered their passion for compassion via baking for a charity event or fête, making food to help friends or family, or taking cake to work for colleagues.

Over a sixth of us cook for others more often today than we did five years ago, our analysis found. And with many of these home chefs (around a third) aged under 35, it seems 'kindness cooking' is here to stay. This is reflected in sales of home-baking ingredients at Waitrose & Partners, with icing and cooking chocolate increasingly popular, while searches for 'bread baking' are up five-fold on Pinterest.

As well as offering home-baked presents, people are also giving the gift of cookery itself. Sales of gift certificates for our Waitrose Cookery School courses have risen by over a quarter, reflecting people's desire to give presents that teach a lasting skill rather than simply buying an object. 'People are taking an interest in developing a hobby such as bread making and then returning to do another related course to further their knowledge,' says Sarah Buck, Partner & chef at Waitrose & Partners' Salisbury Cookery School.

'At Christmas, people are increasingly wanting to make foodie gifts such as festive biscuits, home-made liqueurs, or jams and chutneys. This year we'll be providing more gift-food recipe ideas in response to demand.'

ALISON OAKERVEE  
Partner & Food Editor



THE BIGGEST RISE WAS IN THE NORTH EAST

**25%** OF PEOPLE HERE ARE NOW MAKING MORE FOOD FOR OTHERS

### WHEN DO YOU MAKE FOOD FOR OTHER PEOPLE?\*

**49%** COOKING AT HOME FOR GUESTS  
**33%** TO HELP OUT FRIENDS  
**26%** TO TAKE INTO WORK  
**21%** FOR CHARITY BAKES, FÊTES AND FUNDRAISERS  
**5%** TO RECEIVE PAYMENT AS A SIDELINE BUSINESS

\*Respondents could choose more than one option

## TREND FOUR

# CUTTING CLUTTER

We're decluttering our homes as we discard unnecessary distractions and simplify our lives

**F**orty-four per cent of people have cleared out wardrobes recently. Meanwhile, a third of us have tidied our kitchen cabinets or fridges and freezers. Almost a quarter have sorted out bookshelves and nearly a fifth have gone through CDs and DVDs. Only 34% say we haven't cleared out or decluttered our homes at all in recent months.

Partly influenced by tidiness guru Marie Kondo, three-quarters of us say we strive to maintain an organised kitchen. The reasons are practical – it's easier to find things – and psychological; an uncluttered kitchen equals an uncluttered mind.

However, an immaculate larder can also be a thing of beauty. With streamlined cupboards and coordinated canisters now featuring heavily on Instagram, it's no surprise that sales of food-storage tubs are up 21% this year, and larger pantry-style containers are up 6%. Our research shows that 9% of us now take our own receptacles to the supermarket for loose produce or deli items. Indeed, the Unpacked trial, where Waitrose & Partners has been selling unpackaged goods, is being extended after an overwhelmingly positive customer response. After all, cutting down can be good for the planet, too.

WHY DO YOU CHOOSE TO HAVE A TIDY KITCHEN?\*

**80%**  
'IT'S EASIER to find things'

**39%**  
'A TIDY KITCHEN equals a tidy mind'

**35%**  
'I LIKE living simply'

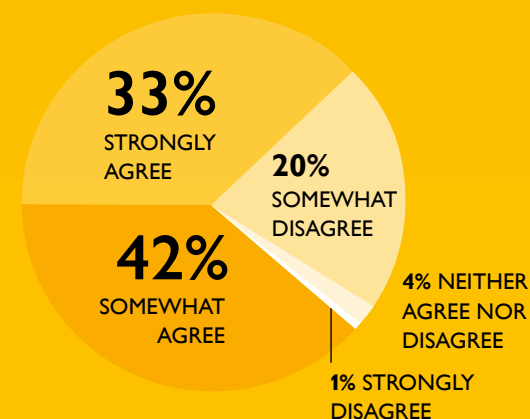
**17%**  
'I'M FED UP WITH my family's mess'

**7%**  
'I'VE BEEN INSPIRED by the media'

**7%**  
'THE OUTSIDE WORLD is unpredictable so I crave predictability at home'

\*Respondents could choose more than one option

### DO YOU TRY TO HAVE A TIDY AND ORGANISED KITCHEN?



'We're hearing from customers that it feels good to be cutting down on unnecessary packaging, not just because it's satisfying to get organised, but also because it's better for the environment, too.'

TOR HARRIS  
Partner & Head of Corporate Social Responsibility



'We're seeing a marked change in attitudes towards drinks. Many people have a broader repertoire than ever before, and think carefully about what they're drinking, looking for an experience and a sense of the occasion, company or season.'

**PIERPAOLO PETRASSI MW**  
Partner & Head of Beers, Wines, Spirits & Soft Drinks

# WHAT WE'RE DRINKING

## ALL ABOUT TASTE

We're starting to see a subtle shift in how people view their evening drink, with the focus more on flavour than alcohol content. So drinkers will be thinking first about whether they want to sip on something bitter, sweet, long or cold, rather than whether it's alcohol based. This trend is partly due to prioritising health, but also thanks to non-alcoholic mixers such as Fever-Tree, Coca-Cola and Double Dutch innovating heavily and moving upmarket.

Alongside the growing importance of flavour, we're seeing a rise in the popularity of lower-alcohol drinks. A simple vermouth and tonic, for example, or a plain Campari and soda have a lower ABV than a classic G&T.

But quality is still important. People haven't lost their appetite for excitement and exploration: they want drinks they might expect to find in any of the great bars of the world. In a world of discovery, people want to make their drinks count.

## BYO BOTTLES

The concept of buying beer and wine in a refillable container comes from America, where 'growlers' are popular. But trials over here suggest that bringing your own bottle could soon become the norm in the UK.

Sustainability, personalisation and value for money are the main reasons for this rise in refillables. The Unpacked pilot at the Waitrose & Partners Oxford Botley Road store had phenomenal results. Four types of wine and four draught beers (from Toast, which brews using unwanted bread – fitting perfectly with the green aspect of this trend) were available. Ten weeks' worth of beer sold out in just four days and the trial is already being extended to three more stores.

# WHAT LED THE WAY IN 2019 GOING UP

## ANYTHING PINK

Britain's love affair with pink gin and rosé wine seems to be expanding: drink aisles are now an explosion of pink. From rosé vermouth and Champagne to Cocchi Rosa, an Italian aromatised wine, there are blushes all round.

## ENGLISH ORANGE WINE

A bumper harvest in 2018 has led to a boost in sales of English and Welsh wine this year. For something different, look out for Litmus Orange, the first English orange wine to be sold in a supermarket. Leaving the skin on the grapes during the ageing process creates the unusual 'orange' colour.

## GRAPE ADVENTURES

With wine drinkers now quite familiar with the most common grape varieties, they're becoming confident enough to explore more unusual ones. Eastern European wine, in particular, is gaining popularity: sales of the dry Slovenian Furmint – a grape characterised by electric acidity – are up 159%.

Waitrose & Partners has tapped into the trend for 'controlled discovery' with the launch of nine lesser-known wines, including grape varieties that three-quarters of people hadn't heard of. But more drinkers will now be sampling the likes of Arinto from Portugal or Cannonau from Sardinia.

## DRINKS TOURISM

The number of drinks enthusiasts taking guided tours behind the scenes at the UK's vineyards, breweries and distilleries has rocketed in recent years.

Visits to Scotch whisky distilleries have risen by 56% since 2010, while one London gin distillery has seen visits rise by 2,000% since 2015.

## MORE BUBBLES

Sales of sparkling keep rising with shoppers keen to try new fizzes in addition to Prosecco. Cava is making a resurgence, but we're also looking to effervescent wines from Australia, New Zealand and South Africa.

## ALCOHOL-FREE NEGRONI

The classic gin, vermouth and Campari cocktail is celebrating its 100th birthday this year. But thanks to the boom of quality non-alcoholic drinks, it's now possible to make an alcohol-free version that is practically indistinguishable from its very potent cousin. Using a gin alternative such as Seedlip and an Æcorn alcohol-free aperitif, the teetotal negroni is yours.

## GOOD-LOOKING GLASS

With elegant shapes and intricate designs, spirit bottles are now definitely things of beauty. So much so that we're repurposing rather than recycling: using them as table centrepieces, draping fairy lights around them at home, or transforming them into diffuser-stick holders.

## CANS OVER BOTTLES

Alcohol packaged in cans used to be frowned upon. But thanks to the craft beer boom, sales of canned lager now outstrip bottled. Ready-to-drink cocktails in a tin are also flying off the shelves and Waitrose & Partners is selling English wine in a can, too. Aluminium is proving popular as it's easily recyclable and cans already contain a high proportion of recycled content, making them a green choice.

## DIY FLAVOURED SPIRITS

Instead of buying pre-flavoured gins or vodkas, we're increasingly taking a homespun approach and adding our own choice of fruits, herbs or botanicals to plain spirits. It's theatrical, creative and personalised. And it makes a great gift.



It was 25 years ago that an item was sold securely over the internet for the first time\*. This seemingly unremarkable event has influenced shoppers' behaviour like nothing else, as our investigation shows

Today, one in eight of us does an online grocery shop at least once a week, while nearly four in 10 do it once a month or more. The most prolific internet shoppers are 35-44 year olds – half of this age group do their food shopping online at least once a month, and 29% at least once a fortnight. Around 40% of the population remain refuseniks – they claim never to shop for groceries online.

The increasing availability of more convenient, shorter-notice delivery slots is one reason why so many people are shopping online. It also means we're shopping later in the week than we used to. In the last year alone, the weekly spike in placing orders on waitrose.com has moved from Wednesday evenings to Thursday evenings, 7pm-9pm.

Overall, the number of people shopping between 5pm and 11pm throughout the week is up 16% on last year.

Smartphones are a catalyst to changing habits, too. Half of all visits to waitrose.com today are done through a mobile device – up nearly a tenth on last year. Just under a third of all shoppers told us that they 'often' or 'sometimes' get their phone out in the supermarket to compare prices, look up information on a particular product, or seek recipe inspiration. This number rises to over half among the under-35s. This means that it's the norm, rather than the exception, for anyone born after 1985 to 'dual shop' online when they're in a bricks and mortar store. We're seeing this at waitrose.com – page views are up 28% this year.

**39%**  
OF THE POPULATION  
REMAIN REFUSENIKS...

...claiming  
never to shop  
for groceries  
online

**61%**

OF BRITS DO AT LEAST SOME OF  
THEIR FOOD SHOPPING ONLINE

**1/2** OF ALL VISITS  
TO WAITROSE.COM  
TODAY ARE DONE  
THROUGH A  
MOBILE DEVICE

**9%**  
UP ON  
LAST YEAR

SMARTPHONES ARE A CATALYST TO CHANGING HABITS

THE MOST PROLIFIC  
INTERNET GROCERY  
SHOPPERS ARE 35-44  
YEAR OLDS; half of this  
age group buy food online  
at least once a month

**29%**  
OF 35-44 YEAR OLDS  
DO AN ONLINE  
GROCERY SHOP  
AT LEAST ONCE  
A FORTNIGHT



'Online and physical shopping are closer than ever – a seamless and intuitive experience is essential. We know that customers who shop across our website, app and in-store are our most loyal and frequent shoppers.'

LAURA BURBEDGE  
Partner & Head of Digital  
Development

TOP REASONS  
WHY PEOPLE  
LIKE GROCERY  
SHOPPING  
ONLINE

- 1 It's simple
- 2 Someone else carries the bulky stuff to my house
- 3 It's easier to stick to a budget
- 4 I prefer to avoid the supermarket: the queues, the parking, the busy aisles...
- 5 Ordering online is a good use of dead time, for example when I'm commuting
- 6 I like looking at the extra product information and recipe suggestions available online
- 7 It's better for the environment than me driving there

LONDONERS DO  
MOST ONLINE  
FOOD SHOPPING  
**28%**  
do it once a  
fortnight or more

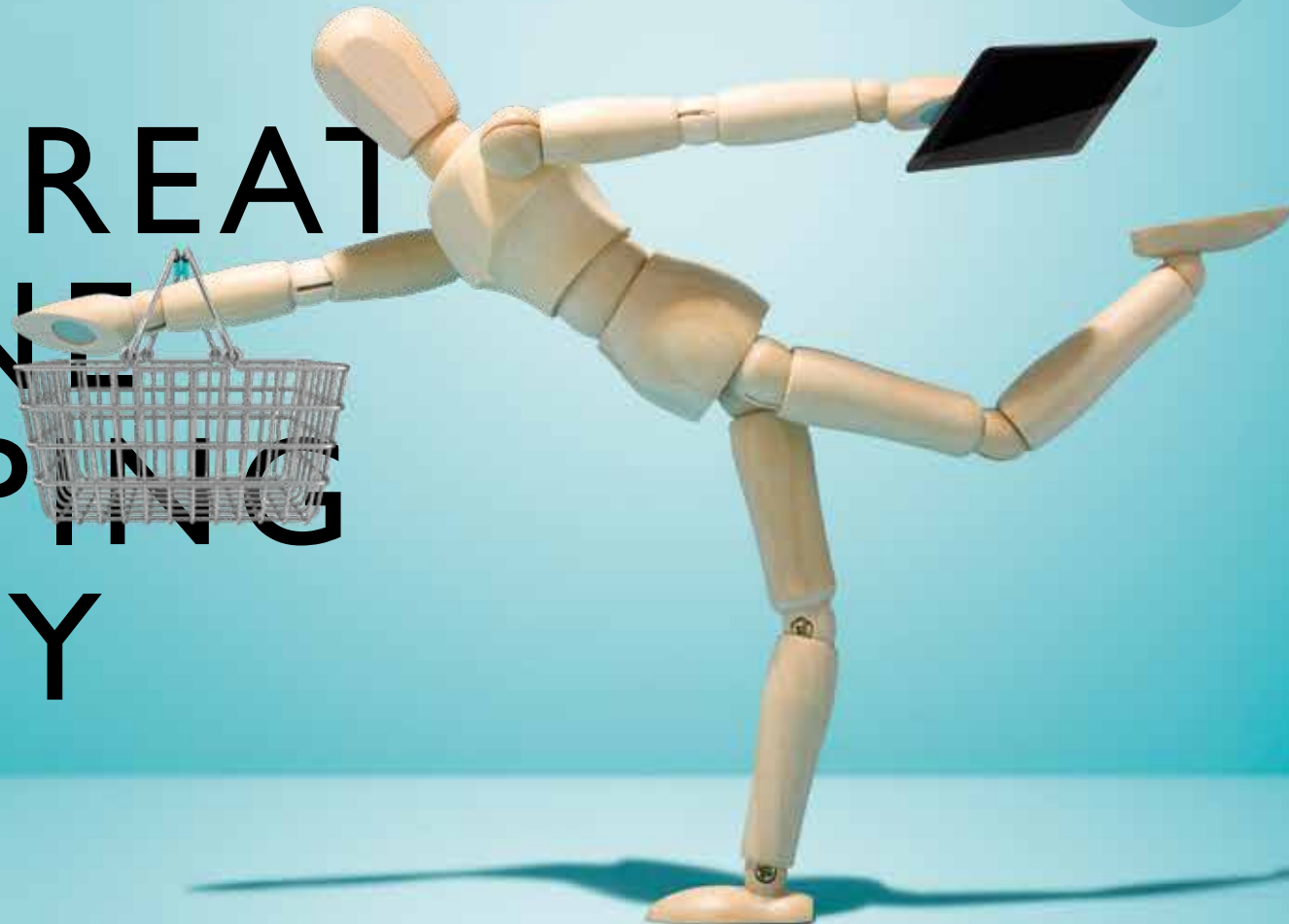
SPIKES IN DEMAND  
FOR WAITROSE  
RAPID DELIVERY

(a two-hour delivery service – the trial was recently extended outside of London)

LUNCHTIMES AND AFTER WORK:	SATURDAY EVENING:	LATE SATURDAY NIGHT:
Orders for dinner that evening (especially pizzas, ready-meals and alcoholic drinks)	Very last-minute dinner ingredients	Cooked breakfast ingredients

HOW WE SHOP NOW:

# THE GREAT ONLINE SHOPPING SURVEY



\*a Sting CD, incidentally

# A NATION OF

## SCOTLAND

If buying a lunchtime sandwich, the Scots' favourite combination is a cheese-and-ham sandwich with a bag of Flame-Grilled Steak crisps.

## NORTHERN IRELAND

The Northern Irish are most likely to eat crisps during a cinema or theatre performance, with over a third (38%) admitting to this.

## NORTH WEST

People living here are most likely to bring a packet of crisps to a dinner party in case they get hungry later, with 16% saying they would do this.

## NORTH EAST

People here get most annoyed when others eat crisps loudly, with 41% admitting to irritation with public crunching.

## YORKSHIRE AND THE HUMBER

People in Yorkshire are least keen on dipping their crisps – more than half said they didn't usually dip.

## EAST MIDLANDS

20% of people living in the East Midlands have attempted to make their own crisps at home.

## EAST ANGLIA

Sour cream and onion flavoured crisps are more popular here than anywhere else in the country.

## LONDON

Londoners are the biggest dippers, with two-thirds (68%) saying they prefer a dip with their crisps.

## SOUTH EAST

Love it or hate it, southerners are most likely to eat Marmite-flavoured crisps, with 7% saying they are a preferred flavour. But their overall top choice is salt and vinegar – like the Welsh, they prefer it to the national favourite of cheese and onion.

# CRISPS LOVERS

## WALES

The Welsh eat more packets of crisps per week than anyone else in the UK, at an average of nearly 4 packets each. They're also the most likely to view crisps as a British 'institution', on a par with a roast dinner.

## WEST MIDLANDS

Ready salted is this region's favourite flavour. It's the only place where 'plain' crisps are preferred to the nation's favourite of cheese and onion.

## SOUTH WEST

West Country folk like their crisps thick and crunchy – 40% would choose this texture (more than any other region in the UK).

## THE CRUNCH

# 178

— THE NUMBER OF PACKETS THE AVERAGE CRISP EATER CONSUMES EVERY YEAR

CHEESE AND ONION is the UK's favourite flavour. Salt and vinegar and ready salted take second and third places.

OUR FAVOURITE DIP is sour cream, with 21% of us having tried it. This was closely followed by houmous and tomato salsa. However, nearly half (46%) say they don't dip their crisps.

CRISP LOVERS' other preferred snacks are crackers (71% are open to replacing their favourite crisp with a cracker), followed by vegetable crisps (70%) and then nuts (65%).

## THE ETIQUETTE

# 31%

GET ANNOYED WHEN WE HEAR SOMEONE CRUNCHING ON CRISPS.

...YET 50% OF US HAVE EATEN CRISPS ON PUBLIC TRANSPORT AND A THIRD (33%) HAVE DONE SO DURING A PERFORMANCE AT THE CINEMA OR THEATRE.

9 IN 10 BRITS agree you shouldn't 'double dip' at a social event, but 17% think it's OK between friends and family.

# 86%

OF PEOPLE THINK it's socially acceptable to shake the crumbs from a packet into their mouths. But 73% think it is uncouth to put crisps inside a sandwich in front of other people.

ALMOST A THIRD (30%) of us have eaten crisps in bed.

ONLY A QUARTER OF BRITS (26%) would think to open up a bag of crisps to share at the pub.

Data a combination of Waitrose & Partners sales, our OnePoll research, and Walkers Kantar and Nielsen research on behalf of Waitrose & Partners



Brits are spicing things up, thanks to the resurgence of the chilli. Sales of the little red devils have risen over the last year, as we're finding more imaginative culinary uses for them

# HOT HOT HOT

A fifth of us are eating more spicy food than we used to. Demand for spicy ready-meals is growing – Waitrose & Partners has launched curries with spice ratings of four and five for the first time this year, up from a maximum of three. Our research found that Brits' increased appetite for hot food is strongest among the under-35s. The longest queues at festivals this summer seemed to be at curry stalls rather than burger stands. However, this doesn't mean that young people have the highest tolerance for heat. Far from it: when it comes to spice, people aged between 45 and 54 have the hottest palate.

Chilli is appearing in products you wouldn't traditionally expect, such as chocolate and popcorn. We're also using it as a condiment – often as a substitute for salt. For example, a quarter of those reducing their sodium intake are replacing it with chilli flakes or sauce. 'There's an enormous range of chillies available and they represent a more complex flavour than just "hot". Some are fruity, some are smoky and some inevitably do have a proper punch of heat – like a Scotch bonnet or a bird's-eye,' says Andrew Morris from Waitrose & Partners Cookery School.

## HOW ARE WE EATING CHILLI?

'Sprinkled over ice cream'  
Lynne, 62, academic

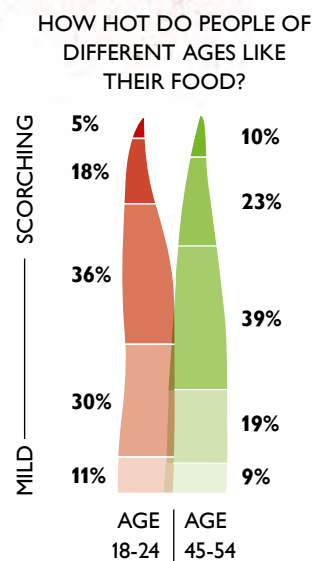
'I have put chilli flakes on omelettes and it's great'  
Latarra, 25, recruitment consultant

'I wouldn't put it in hot chocolate, but I would in a margarita or a spicy cocktail'  
India, 31, executive assistant

'Chilli is a great way to add extra flavour and interest to food, and people are increasingly using it in place of salt. Chillies also contain a compound that can cause natural "feel good" chemicals to be released by our brains. So our reason for enjoying spice could sometimes be more than just because it's tasty.'

MOIRA HOWIE

Partner & Nutrition and Health Manager



# 20%

OF US EAT MORE SPICY FOOD THAN FIVE YEARS AGO

PEOPLE IN THE NORTH WEST like their food the hottest. They are twice as likely to opt for food that is 'very spicy' as people from the East Midlands. **26%** OF US have replaced putting salt on the table with chilli sauce or flakes.

## MIDDLE EASTERN FOOD AT HOME

Many of us have been buying houmous or falafels for some time – and the kebab house holds a place in many Brits' hearts. But now we're dabbling with the complex flavours of Middle Eastern cuisine at home as well. Waitrose Cookery School courses in Middle Eastern Mezze, Moroccan Kitchen and Chicken Shawarma are currently sell-outs, while rising sales of sumac, baharat and zaatar show that we're cooking increasingly ambitious dishes.

'It's no surprise Middle Eastern cuisine is hitting the mainstream,' says Zoe Simons, Partner & senior innovation development chef at Waitrose & Partners. 'Already established with foodies, it offers both spice and sweetness.'

## CELLAR SUBSTITUTES

One in five under-35s is less likely to put salt on the table at mealtimes than they used to, our research found, suggesting we're seeing the demise of the salt cellar. Hot sauce, chilli flakes or an extra grind of black pepper are often used as a healthier alternative to salt. But, increasingly, a sprinkle of mint, basil or nutmeg is being used as seasoning. Our love for saltiness remains, though, and innovative dishes are replicating the flavour, from crispy chicken skin and halloumi ice cream to tapenade on toast. We can look forward to less salt, but more saltiness.

## ANIMAL WELFARE

The number of flexitarians in the UK continues to rise: a third\* of Brits are eating less meat and fish than two years ago, and 32% plan to reduce their consumption even more over the next two years. More than a quarter of us (26%) say that we plan to look for better quality meat or fish while limiting how often we buy it. Shoppers are most likely to choose free-range, British meat, with the top factors influencing purchase being sourcing, provenance and welfare standards.

The increased interest from customers is also apparent with views of the animal welfare page on waitrose.com up by 37%.

'We're seeing a more considered approach to meat. Because some people are eating less of it, when they do eat it they want to make it count; they want to really enjoy it. We see this demand for meat produced to high standards continuing to become more pronounced in the years to come.'

TOR HARRIS

Partner & Head of Corporate Social Responsibility

# FUTURE TRENDS

## SEACUTERIE

This is a reimaging of charcuterie, using seafood instead of meat. A trend that started in Australia, it incorporates pickling, fermenting, smoking and ageing, and is finding its way to these shores. Cornerstone restaurant in London's Hackney Wick offers salmon pastrami and citrus-cured brill, while dishes elsewhere include octopus salami, swordfish ham and shellfish sausages. It's likely to become even more popular as chefs and enthusiastic cooks begin to add value to fish in ways they've done with meat for many years.

'In recent years, we've seen UK chefs turning out classic meat-based charcuterie to rival anything produced on the Continent,' says Amber Dalton, editor of The Good Food Guide, 'so it makes total sense that they'd look to the sea's bounty to create intriguing new dishes using time-honoured preserving techniques.'

LOOK OUT FOR IN 2020 AND BEYOND

THE FOOD FASHIONS TO LOOK OUT FOR IN 2020 AND BEYOND

\*Research YouGov for Waitrose, August 2019, 2067 UK adults (nationally representative)



**2000**

Waitrose.com online delivery service launched. We were all eating cupcakes (thanks to Sex And The City). There were 361 million internet users in the world and a global population of 6.1 billion.

**2005**

YouTube launched. Molecular gastronomy made a comeback. Interest started to rise in organic, local and sustainable food.

**2010**

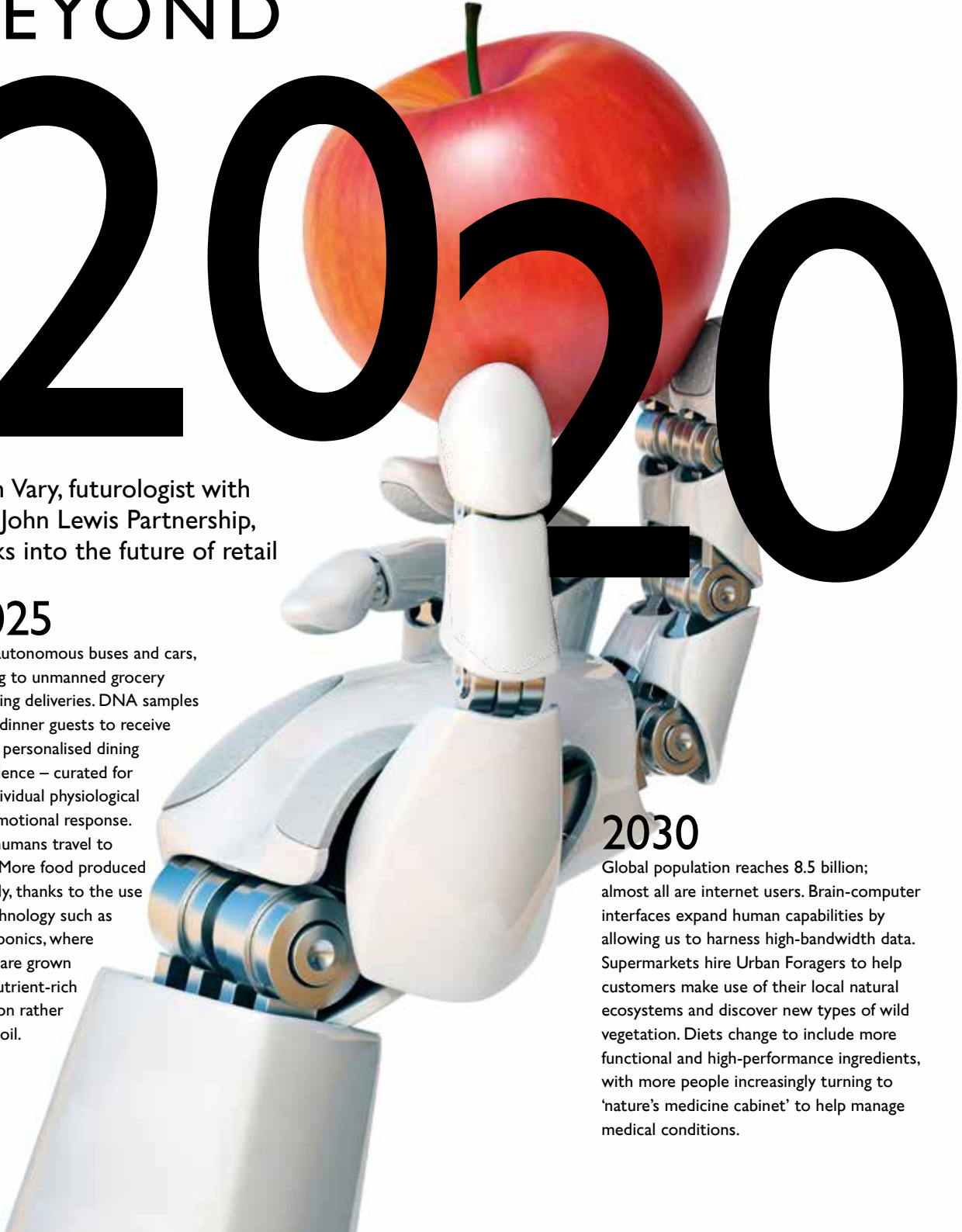
Instagram launched. Trend for gluten-free food. Doughnuts dubbed the new cupcakes.

**2015**

Apple Watch released. The 2015 Waitrose Food & Drink Report highlighted avocados, spiralisers, NutriBullets and everything coconut among top food trends. Macarons dubbed the new doughnuts.

# BEYOND

# 2020



John Vary, futurologist with the John Lewis Partnership, looks into the future of retail

**2025**

Fully autonomous buses and cars, leading to unmanned grocery shopping deliveries. DNA samples allow dinner guests to receive a fully personalised dining experience – curated for an individual physiological and emotional response. First humans travel to Mars. More food produced globally, thanks to the use of technology such as hydroponics, where crops are grown in a nutrient-rich solution rather than soil.

**2030**

Global population reaches 8.5 billion; almost all are internet users. Brain-computer interfaces expand human capabilities by allowing us to harness high-bandwidth data. Supermarkets hire Urban Foragers to help customers make use of their local natural ecosystems and discover new types of wild vegetation. Diets change to include more functional and high-performance ingredients, with more people increasingly turning to 'nature's medicine cabinet' to help manage medical conditions.